



Effective Teaming Strategies: Toolkit

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1. Form a team.

State wide implementation requires a team of people to make better decisions, share resources and facilitate understanding and buy-in of the initiative and practices. The team should be no more than 15 people to build relationships and make efficient decisions. Select key stakeholder and/or their representative. The team should plan to meet for at least 2-3 years and to meet monthly for at least 3 hours in the first year. A person serves as coordinator or convene to provide the team with administrative support.

2. Use collaborative decision making.

No one person makes the decisions. The team does. This will lead to better decisions and buy-in or support of the new way of doing things. Share facilitation of each meeting. Use decision making activities that help to get everyone's voice and good ideas such as round robin, small group discussion, sticky wall brainstorming. Use consensus not voting to reach decisions. Voting can create a feeling of "winning" and "losing".

3. Write a vision statement.

In the first or second meeting, the team develops a written vision statement. This will set the direction and goal of the work. It should be short (two or three sentences) and clear so that all team members as well as others know exactly what the goal of the work is. The team decides that the vision statement is not written in stone! It can be changed by the team. This helps make the process short and likely can be done in one meeting with email follow up.

4. Adopt team ground rules/norms.

In the first or second meeting, the team adopts a set of meeting ground rules or norms to ensure that meetings run smoothly and are productive and efficient. Examples of critical logistics and ground rules from previous teams are:

Sample Team Meeting Ground Rules

- **No substitutes:** members attend rather than sending representatives to ensure consistency, efficiency (no need to constantly rehash past decisions) and build relationships and trust.
- **Decision making:** members support decisions made in their absence; use consensus if possible. If consensus cannot be achieved, use: "*modified consensus*", i.e., what can be changed so that we can live with this decision and publicly support it?
- **Meeting facilitation:** meetings must be facilitated by an objective person who plans decision making activities to make sure the meeting is productive, meets its objectives and everyone feels like they were heard and valued. This does not require an outside expert. Meeting facilitation can be done by one member or members can rotate facilitation.
- **Share meeting responsibilities:** members volunteer to facilitate, serve as timekeeper (to ensure the agenda is followed and is kept to time allotments), note taker, snack provider, etc.

- **Set meeting time and place:** for at least 6 months in advance.
 - **New Member Orientation:** Members provide an orientation session along with “Buddies” for each new member.
 - **Interactions:** Respect all opinions (all ideas have value), share decision making, share the floor, each person should have the opportunity to talk before another speaks twice, honor confidentiality.
 - **Stakeholder Input:** use of ad hoc participants, workgroups, focus groups, survey, interviews, special projects, etc. as needed to ensure broad representation and input.
 - **Start and end on time.**
 - **Stay outcome-focused:** Use a “Parking Lot” to record subjects not on the agenda.
 - **If meetings have to be canceled due to weather:** Chair(s) or staff will send an email by 7:00 a.m. the day of the meeting.
 - **Materials for meetings:** to be sent out one week prior.
 - **Celebrate big and small accomplishments**
- 5. Use a meeting agenda, meeting summary and meeting evaluation format that facilitates a well-organized meeting.**

Meeting agendas should be written and sent ahead of time. They should include the time and place for the meeting, meeting roles (facilitator, snack provider, timekeeper, etc.), the objectives for that meeting, agenda items with time allotments. Meeting summaries should be short and essentially document decisions made. The summary could be an extension of the agenda form. See a sample agenda and meeting summary template attached. Meeting roles sign up sheet is attached. Meeting evaluations ensure that team members consider it an important use of their time. A specific evaluation can be completed individually and summarized by the coordinator and sent out to the team after each meeting or a group discussion of what worked or what needs to be improved can be held after each meeting. See a sample meeting evaluation attached.

6. Participation remotely.

While it is important to meet as often as possible face to face to build relationships, sometimes, team members need to participate at least occasionally remotely. It is strongly encouraged that the first 3 or 4 meetings be face to face to build relationships and to continue to meet face to face as often as possible. However, if some members need to meet remotely occasionally, materials are sent ahead of time, audio and visual technology is works well, and the meeting facilitator ensure remote members' perspectives are shared.

7. Develop a written action plan.

In the second or third meeting, the team identifies challenges to the vision (why aren't we there yet?). Based on these challenges, the team then identifies strategies for addressing the challenges. Once these strategies are identified, a written action plan is developed. The written action plan is an important part of the meeting agenda, drives every meeting and documents progress. See a sample action plan template attached.

Team Meeting Evaluation

Date:

Meeting Objectives:

- 1.
- 2.
- 3.

Please answer the following questions...

	<u>Low</u>				<u>High</u>
Degree to which the meeting objectives were achieved	1	2	3	4	5
Facilitation of the meeting was	1	2	3	4	5
I would rate my own contributions to the meeting as	1	2	3	4	5
Degree to which I think this meeting contributed toward achieving our purpose	1	2	3	4	5

Comments

ACTION PLAN

Vision/Goal Statement:

Date:

Team Members:

Challenge:

Objective/Solution/Strategy:

Action Steps (short and long term)	Who is Responsible	Timeline	Resources Needed	Evaluation/Outcome/Date Completed

Team Meeting Role Sign-up Sheet

Meeting Date	Host/ Buddy for Absent Members	Facilitator	Snacks	Timekeeper	Note taker

Team Roles: **Facilitator** = Lead team meetings in a way that is perceived to be fair, helps the team stay focused, make shared decisions and supports the building of relationships needed for effective work; **Note taker**= Records decisions for team and disseminate to team; each member will take their own notes; sends to team no later than 2 days prior to the next meeting; **Timekeeper** = Keeps track of time allotments on agenda and reminds team of time remaining for each agenda item so that the team can complete items in a timely manner OR adjust agenda as needed; **Snacks**=provides coffee, tea, and light snacks; **Host/Buddy**=Welcomes guests, explains expectations, seating, provides handouts and answers questions; makes sure absent members are brought up to date.